

Filling out the Purchase Request Form

Visit the Forms page under Resources & Programs menu on the Business Operations Center website to download the Purchase Request Form. <https://ucanr.edu/site/uc-anr-business-operations-center/forms#PurchReqForm>. This instructional guide covers how to fill out the Purchase Request Form as well as policies for purchases over \$100K.

UNIVERSITY OF CALIFORNIA Agriculture and Natural Resources				PURCHASE REQUEST FORM																																																										
VENDOR INFORMATION				REQUESTOR INFORMATION																																																										
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Date Range of Event/Work or Date Items needed by: _____				Agreement/PO#: _____																																																										
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Revised Jan 2026																																																														

Top Section

Vendor and Requestor Information


Fill out the Vendor Information Section with the main HQ of the company or vendor from which you're making the purchase. Requestor Information should be your work information. E.g., work phone number and email address, and primary work location.

Date Range of Event/Work or Date Items needed by

Fill this out with either the date by which you need the product. Be sure to fill out this form with ample time for processing and approvals. If your purchase involves work over the course of a few days, list the dates when the work will take place here.

Paying Supplier by Card?

Check yes if you plan to use your Procurement Card (P-Card) or Travel Card (T&E) to make this purchase. This is not allowed if purchasing a Capital Asset. Check no if you plan to use a check or other payment method to make this purchase.

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Business Purpose

This must be descriptive and specific as to why this purchase makes sense using University funds. "Office supplies" is too vague a description. "Office supplies for team members to use in the UCCE Office" is sufficient.

Business Purpose:	
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Line Items and Charges

- Line = Item
- Quantity = how many items, hours, days, etc. you wish to purchase
- UOM = Unit of Measure. Write in “unit” if it’s a product. Write in “hour” if paying hourly for a service, and so on.
- Description: Fill out the description of items or services as specifically as possible.
- Unit Price = Charge per item, per hour, per day
- Total = Enter the total for each line
- Sales Tax and Shipping: Fill this out with the total sales tax and shipping costs for the entire order.
- Comments: Optional but the more information you submit, the better.
- Total: This will automatically fill in as the sum of all rows in the Total column.

Contact your Business Partner or Business Manager if you wish to purchase more than 6 item

Line	Quantity	UOM	Description	Unit Price	Total
A					0
B					0
C					0
D					0
E					0
F					0
Comments:				Sales Tax	
				Shipping	
				TOTAL	0

Chart String

Select GL or PPM from the drop-down menu. Then type in your approved Chart of Accounts. If using more than one account for this purchase, be sure to fill out the percentage column and have the lines add up to 100%.

Chart String										
GL/PPM	Entity	Fund	Financial Dept.	Purpose	Program	Project	Activity	Task	Percentage	Amount
									0.00%	\$ 0.00

Approvals

You must download the form and open it from your file browser (not a web browser) in order for the signature blocks appear.

APPROVALS		
		
<i>Director/Supervisor signature</i>	<i>Fiscal Officer signature (Required for SWPR/REC)</i>	<i>AVP Finance and Capital Planning signature (Required for all purchases \$100,000+)</i>
		
<i>PI signature (if using award/grant funds)</i>	<i>Chief Procurement Officer signature (Required for sole source purchases \$100,000+)</i>	
Revised Jan 2026		

Note for purchases over \$100K

- Any purchase \$100K or higher must be reviewed and approved by Jennifer Bunge (jennifer.bunge@ucop.edu), Associate Vice President, Finance & Capital Planning (Interim).
- If an existing purchase order has an amendment that will put the PO at \$100K or higher than it will also need to be reviewed by Jennifer.
 - If Jennifer is out-of-office**, request approval from:
Darryl Sweet (drsweet@ucanr.edu), Chief Procurement Officer or
Kathy Eftekhari (kathy.eftekhari@ucop.edu) Associate Vice President, Administrative Services (Interim) and Chief of Staff to the Vice President.
- If a Director is making the purchase, it must be reviewed and approved by their supervisor prior to being sent to Jennifer.

Note for Sole Source Purchases over \$100K: If a purchase has a Sole Source, it must be reviewed and signed off by Darryl Sweet (drsweet@ucanr.edu), Chief Procurement Officer. For more information, visit our Purchasing Processes webpage:

<https://ucanr.edu/site/uc-anr-business-operations-center/purchasing-processes#SoleSource>.